

The patient experience in a chiropractic office encompasses your **clinical outcomes**, **service**, and **hospitality**. Use this checklist to ensure a friction-free experience at every phase of the patient journey.

New Patients

- Online scheduling available
- Phones answered; quick call-back policy in place
- Ability to schedule within 48 hours
- Social media direct messages monitored
- Online paperwork offered (or paper forms ready on arrival)
- Patient reminded to wear appropriate attire for lower extremity issues
- Plan in place for various language-speaking patients
- Short wait time protocol established
- Welcome video prepared and ready to show
- Insurance verified for new patient before arrival
- Entire treatment plan scheduled out in advance
- Treatment plan handouts / ChiroUp reports provided
- Stored payment method collected
- Package and payment options presented
- Treatment plan recommendations communicated clearly

Active / Existing Patients

- Short wait time in office maintained
- Two-way texting service available
- Online scheduling available
- Social media direct messages monitored
- No-Futures system implemented
- Payment stored on file
- Seamless referral process in place
- Exercises accessible digitally for patients
- Staff and doctors respond promptly to patient-specific needs
- Treatment plan recommendations provided

Inactive Patients

- Appointment offered within 48 hours
- Social media direct messages monitored
- Access to health education resources provided
- Treatment plan recommendations communicated
- All Active/Existing Patient protocols applied

Tip: Print and post this checklist in your staff area, or share digitally with your team for easy tracking.